

Administrative Office Procedures



Sample

Corporate Training Materials

Corporate Training Materials

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Preface

What is Courseware?



Welcome to Corporate Training Materials, a completely new training experience!

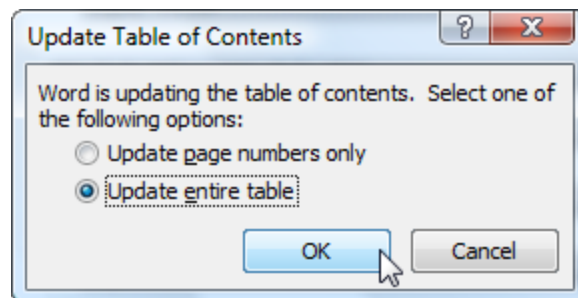
Our courseware packages offer you top-quality training materials that are customizable, user-friendly, educational, and fun. We provide your materials, materials for the student, PowerPoint slides, and a take-home reference sheet for the student. You simply need to prepare and train!

Best of all, our courseware packages are created in Microsoft Office and can be opened using any version of Word and PowerPoint. (Most other word processing and presentation programs support these formats, too.) This means that you can customize the content, add your logo, change the color scheme, and easily print and e-mail training materials.

How Do I Customize My Course?

Customizing your course is easy. To edit text, just click and type as you would with any document. This is particularly convenient if you want to add customized statistics for your region, special examples for your participants' industry, or additional information. You can, of course, also use all of your word processor's other features, including text formatting and editing tools (such as cutting and pasting).

To remove modules, simply select the text and press Delete on your keyboard. Then, navigate to the Table of Contents, right-click, and click Update Field. You may see a dialog box; if so, click "Update entire table" and press OK.

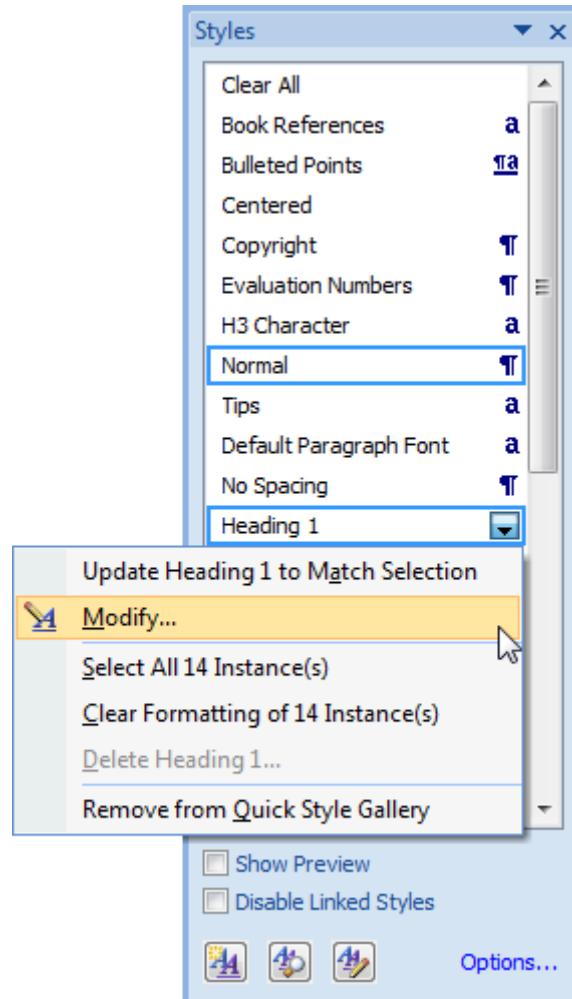


(You will also want to perform this step if you add modules or move them around.)

If you want to change the way text looks, you can format any piece of text any way you want. However, to make it easy, we have used styles so that you can update all the text at once.

If you are using Word 97 to 2003, start by clicking the Format menu followed by Styles and Formatting. In Word 2007 and 2010 under the Home tab, right-click on your chosen style and click Modify. That will then produce the Modify Style options window where you can set your preferred style options.

For example, if we wanted to change our Heading 1 style, used for Module Titles, this is what we would do:



Now, we can change our formatting and it will apply to all the headings in the document.

For more information on making Word work for you, please refer to [Word 2007 or 2010 Essentials](#) by Corporate Training Materials.

Materials Required

All of our courses use flip chart paper and markers extensively. (If you prefer, you can use a whiteboard or chalkboard instead.)

We recommend that each participant have a copy of the Training Manual, and that you review each module before training to ensure you have any special materials required. Worksheets and handouts are included within a separate activities folder and can be reproduced and used where indicated. If you would like to save paper, these worksheets are easily transferrable to a flip chart paper format, instead of having individual worksheets.

We recommend these additional materials for all workshops:

- Laptop with projector, for PowerPoint slides
- Quick Reference Sheets for students to take home
- Timer or watch (separate from your laptop)
- Masking tape
- Blank paper

Maximizing Your Training Power

We have just one more thing for you before you get started. Our company is built for trainers, by trainers, so we thought we would share some of our tips with you, to help you create an engaging, unforgettable experience for your participants.

- **Make it customized.** By tailoring each course to your participants, you will find that your results will increase a thousand-fold.
 - Use examples, case studies, and stories that are relevant to the group.
 - Identify whether your participants are strangers or whether they work together. Tailor your approach appropriately.
 - Different people learn in different ways, so use different types of activities to balance it all out. (For example, some people learn by reading, while others learn by talking about it, while still others need a hands-on approach. For more information, we suggest Experiential Learning by David Kolb.)
- **Make it fun and interactive.** Most people do not enjoy sitting and listening to someone else talk for hours at a time. Make use of the tips in this book and your own experience to keep your participants engaged. Mix up the activities to include individual work, small group work, large group discussions, and mini-lectures.
- **Make it relevant.** Participants are much more receptive to learning if they understand why they are learning it and how they can apply it in their daily lives. Most importantly, they want to know how it will benefit them and make their lives easier. Take every opportunity to tie what you are teaching back to real life.
- **Keep an open mind.** Many trainers find that they learn something each time they teach a workshop. If you go into a training session with that attitude, you will find that there can be an amazing two-way flow of information between the trainer and trainees. Enjoy it, learn from it, and make the most of it in your workshops.

And now, time for the training!

Icebreakers

Each course is provided with a wide range of interactive Icebreakers. The trainer can utilize an Icebreaker to help facilitate the beginning of the course, as it helps “break the ice” with the participants. If the participants are new to each other, an icebreaker is a great way to introduce everyone to each other. If the participants all know each other it can still help loosen up the room and begin the training session on positive note. Below you will see one of the icebreakers that can be utilized from the Icebreakers folder.

Icebreaker: Friends Indeed

Purpose

Have the participants moving around and help to make introductions to each other.

Materials Required

- Name card for each person
- Markers

Preparation

Have participants fill out their name card. Then, ask participants to stand in a circle, shoulder to shoulder. They should place their name card at their feet. Then they can take a step back. You as the facilitator should take the place in the center of the circle.

Activity

Explain that there is one less place than people in the group, as you are in the middle and will be participating. You will call out a statement that applies to you, and anyone to whom that statement applies must find another place in the circle.

Examples:

- Friends who have cats at home
- Friends who are wearing blue
- Friends who don't like ice cream

The odd person out must stand in the center and make a statement.

The rules:

- You cannot move immediately to your left or right, or back to your place.
- Let's be adults: no kicking, punching, body-checking, etc.

Play a few rounds until everyone has had a chance to move around.

Training Manual Sample

On the following pages is a sample module from our Training Manual. Each of our courses contains twelve modules with three to five lessons per module. It is in the same format and contains the same material as the Instructor Guide, which is then shown after the Training Manual sample, but does not contain the Lesson Plans box which assists the trainer during facilitation.

The Training Manual can be easily updated, edited, or customized to add your business name and company logo or that of your clients. It provides each participant with a copy of the material where they can follow along with the instructor.

*You can't do today's job with
yesterday's methods and be in
business tomorrow.*

Anonymous

Sample Module: Why Your Office Needs Administrative Procedures



Administrative procedures are more than mundane policies. They are put in place to ensure the survival of the company in any event or situation. From catastrophes, to change, to basic day-to-day activities, administrative office procedures address them all when they are done correctly. Business continuity, succession planning, audit requirements, and recovery planning are all included in administrative procedures.

Business Continuity



Business continuity is also known as business continuance. It is the plan in place to keep a company running in the event of a disaster, both during and after the disaster. Establishing business continuity requires identifying essential tasks first. This includes items and services that are critical for the organization to function. These will vary by organization but they include technology, employee safety, sound structure, etc.

Business Continuity Steps:

- Determine risks that the company will likely face (weather, IT, sabotage, etc.).
- Analyze the effects of each risk or hazard that you discover on different aspects of the company (safety, functions, assets, etc). Determine how long your company could function if one of these risks came to pass and what recovery would require.
- Develop a team and strategy to address the potential problems.
- Develop a plan and document each step before sharing it with the rest of the team.
- Test the plan using different methods such as drills, walkthroughs, and checklists.

Succession Planning



Successful succession planning develops a pool of talent so that there are more than enough qualified candidates to fill vacancies in leadership. This strategy requires recruiting qualified talent, creating a talent pool, and instilling loyalty in employees.

- **Identify goals and objectives:** Common goals include profitability, employee loyalty, service, and productivity.
- **Identify needs in the company:** Consider changes in the responsibilities of different positions the company develops.
- **Recognize trends in the workforce:** Understand the changes occurring in within and without your organization, such as an aging workforce.
- **Develop the employee pool:** Determine where to find employees to fill in the gaps (within, recruiting drives, social media, etc.), and develop a plan to engage them once they are chosen.

Internal and External Audit Requirements



Both internal and external audits are important for identifying risks that organizations face. The internal audit addresses how effective and reliable administrative controls are. An internal audit also addresses record accuracy, legal compliance, and management action. Internal audits and external audits are similar, but the internal auditor is an employee of the company that he or she audits. The external auditor is not an employee, and he or she will create a report based on the finances, operations, and compliance of companies. Both internal and external auditors provide recommendations based on their assessments.

The auditor, whether internal or external, is required to be independent and objective, qualified, provide adequate testing, provide adequate documentation and action, offer verification and review, and give a report that will be reviewed by relevant parties, such as the board of directors.

Recovery Planning



Recovery planning goes hand-in-hand with business continuity. Recovery planning or disaster recovery planning is the process that is put in place to recover data, software, hardware, and manpower that the company needs to start back up after a disaster.

Recovery Planning Steps:

- Identify critical systems and prioritize them, and identify potential risks.
- Determine strategies for data, technology, suppliers, people, and facilities.
- Create a plan with step-by-step instructions based on the strategies discovered.
- Test the recovery plan and make adjustments as necessary.

Case Study



Sharon worked at the same company for 26 years. She was coming close to retirement and asked her supervisor if her help was needed training her replacement. She was surprised to learn that no one was in the running for her position, and she retired in a month. Her supervisor explained that they were having trouble finding someone qualified to replace her.

Module Two: Review Questions

1. Business continuity is also called _____.
 - a) Business strength
 - b) Business continuance
 - c) Business conformity
 - d) Business combination
2. What is not an example of a risk?
 - a) Weather
 - b) IT
 - c) Sabotage
 - d) Functions
3. What are profitability, employee loyalty, service, and productivity?
 - a) Goals
 - b) Needs
 - c) Trends
 - d) All of the above
4. An aging workforce is an example of a _____.
 - a) Need.
 - b) Goal.
 - c) Trend.
 - d) None of the above
5. Which type of auditor works for the company being audited?
 - a) External
 - b) Internal
 - c) Both
6. What is Not required of an auditor?
 - a) Objectivity
 - b) Independence
 - c) Reports
 - d) Leadership skills

7. What is the first step in recovery planning?
- a) Identify critical systems
 - b) Create instructions
 - c) Test the recovery plan
 - d) Create a plan
8. What is the last step in recovery planning?
- a) Identify critical systems
 - b) Create instructions
 - c) Test the recovery plan
 - d) Create a plan
9. How long did Sharon work for her company?
- a) 26 years
 - b) 25 years
 - c) 24 years
 - d) Unknown
10. When was Sharon retiring?
- a) A Year
 - b) 2 weeks
 - c) A month
 - d) 2 months

Instructor Guide Sample

On the following pages is a sample module from our Instructor Guide. It provides the instructor with a copy of the material and a Lesson Plans box. Each Instructor Guide and Training Manual mirrors each other in terms of the content. They differ in that the Instructor Guide is customized towards the trainer, and Training Manual is customized for the participant.

The key benefit for the trainer is the Lesson Plan box. It provides a standardized set of tools to assist the instructor train that particular lesson. The Lesson Plan box gives an estimated time to complete the lesson, any materials that are needed for the lesson, recommended activities, and additional points to assist in delivering the lessons such as Stories to Share and Delivery Tips.

*You can't do today's job with
yesterday's methods and be in
business tomorrow.*

Anonymous

Sample Module: Why Your Office Needs Administrative Procedures



Administrative procedures are more than mundane policies. They are put in place to ensure the survival of the company in any event or situation. From catastrophes, to change, to basic day-to-day activities, administrative office procedures address them all when they are done correctly. Business continuity, succession planning, audit requirements, and recovery planning are all included in administrative procedures.

Business Continuity



Business continuity is also known as business continuance. It is the plan in place to keep a company running in the event of a disaster, both during and after the disaster. Establishing business continuity requires identifying essential tasks first. This includes items and services that are critical for the organization to function. These will vary by organization but they include technology, employee safety, sound structure, etc.

Business Continuity Steps:

- Determine risks that the company will likely face (weather, IT, sabotage, etc.).
- Analyze the effects of each risk or hazard that you discover on different aspects of the company (safety, functions, assets, etc). Determine how long your company could function if one of these risks came to pass and what recovery would require.
- Develop a team and strategy to address the potential problems.
- Develop a plan and document each step before sharing it with the rest of the team.
- Test the plan using different methods such as drills, walkthroughs, and checklists.

Estimated Time	7 minutes
Topic Objective	Introduce business continuity.
Topic Summary	Business Continuity Consider business continuity.
Materials Required	01 - Business Continuity
Planning Checklist	None
Recommended Activity	Complete the worksheet individually. Share your answers with the rest of the class.
Stories to Share	Share any personal or relevant stories.
Delivery Tips	Encourage everyone to participate.
Review Questions	What is an essential task?

Succession Planning



Successful succession planning develops a pool of talent so that there are more than enough qualified candidates to fill vacancies in leadership. This strategy requires recruiting qualified talent, creating a talent pool, and instilling loyalty in employees.

- **Identify goals and objectives:** Common goals include profitability, employee loyalty, service, and productivity.
- **Identify needs in the company:** Consider changes in the responsibilities of different positions the company develops.
- **Recognize trends in the workforce:** Understand the changes occurring in within and without your organization, such as an aging workforce.
- **Develop the employee pool:** Determine where to find employees to fill in the gaps (within, recruiting drives, social media, etc.), and develop a plan to engage them once they are chosen.

Estimated Time	10 minutes
Topic Objective	Problem solving.
Topic Summary	Problem Solving Explore creative problem solving.
Materials Required	02 - Succession Planning
Planning Checklist	None
Recommended Activity	Complete the worksheet individually. Share your answers with the rest of the class.
Stories to Share	Share any personal relevant stories.
Delivery Tips	Encourage everyone to participate.
Review Questions	Define succession planning.

Internal and External Audit Requirements



Both internal and external audits are important for identifying risks that organizations face. The internal audit addresses how effective and reliable administrative controls are. An internal audit also addresses record accuracy, legal compliance, and management action. Internal audits and external audits are similar, but the internal auditor is an employee of the company that he or she audits. The external auditor is not an employee, and he or she will create a report based on the finances, operations, and compliance of companies. Both internal and external auditors provide recommendations based on their assessments.

The auditor, whether internal or external, is required to be independent and objective, qualified, provide adequate testing, provide adequate documentation and action, offer verification and review, and give a report that will be reviewed by relevant parties, such as the board of directors.

Estimated Time	7 minutes
Topic Objective	Introduce internal and external audit requirements.
Topic Summary	Internal and External Audit Requirements Consider the importance of imagination and inspiration to the creative process.
Materials Required	Flipchart/board and marker
Planning Checklist	None
Recommended Activity	Discuss your experiences with internal and external audits. Consider the pros and cons of each, and list these on the flipchart/board.
Stories to Share	Share any personal, relevant stories.
Delivery Tips	Encourage everyone to participate.
Review Questions	What do audits identify?

Recovery Planning



Recovery planning goes hand-in-hand with business continuity. Recovery planning or disaster recovery planning is the process that is put in place to recover data, software, hardware, and manpower that the company needs to start back up after a disaster.

Recovery Planning Steps:

- Identify critical systems and prioritize them, and identify potential risks.
- Determine strategies for data, technology, suppliers, people, and facilities.
- Create a plan with step-by-step instructions based on the strategies discovered.
- Test the recovery plan and make adjustments as necessary.

Estimated Time	7 minutes
Topic Objective	Introduce recovery plans.
Topic Summary	Recovery Planning Discuss recovery plans.
Materials Required	03 - Recovery Plan
Planning Checklist	None
Recommended Activity	Complete the worksheet individually. Share your answers with the rest of the class.
Stories to Share	Share any personal, relevant stories.
Delivery Tips	Encourage everyone to participate.
Review Questions	What does a recovery plan relate to?

Case Study



Sharon worked at the same company for 26 years. She was coming close to retirement and asked her supervisor if her help was needed training her replacement. She was surprised to learn that no one was in the running for her position, and she retired in a month. Her supervisor explained that they were having trouble finding someone qualified to replace her.

Estimated Time	5 minutes
Topic Objective	Outline the Why Your Office Needs Administrative Procedures case study.
Topic Summary	Case study Discuss the importance of succession planning.
Materials Required	None
Planning Checklist	None
Recommended Activity	Discuss the outcome of the case study. What should have been done differently? What do you think will happen after Sharon retires?
Stories to Share	Share any personal, relevant stories.
Delivery Tips	Encourage everyone to participate.
Review Questions	Why do you think there was there no replacement?

Module Two: Review Questions

1. Business continuity is also called _____.

- a) Business strength
- b) Business continuance
- c) Business conformity
- d) Business combination

Business continuity is also called business continuance. It keeps a company going in the event of a disaster.

2. What is not an example of a risk?

- a) Weather
- b) IT
- c) Sabotage
- d) Functions

Functions need to be analyzed in business continuity, but they are not risks. The other answers are.

3. What are profitability, employee loyalty, service, and productivity?

- a) Goals
- b) Needs
- c) Trends
- d) All of the above

It is important to determine goals in succession planning. Goals are profitability, employee loyalty, service, and productivity.

4. An aging workforce is an example of a _____.

- a) Need.
- b) Goal.
- c) Trend.
- d) None of the above

Trends are factors that influence the needs of succession planning. An aging workforce is an example of a trend.

5. Which type of auditor works for the company being audited?

- a) External
- b) Internal
- c) Both
- d) Neither

Internal auditors work for the company being audited. External auditors do not work directly for the company being audited.

6. What is Not required of an auditor?

- a) Objectivity
- b) Independence
- c) Reports
- d) Leadership skills

Auditors must be objective and qualified, provide adequate testing, provide adequate documentation and action, offer verification and review, and give a report that will be reviewed by relevant parties. Leadership skills are not required.

7. What is the first step in recovery planning?

- a) Identify critical systems
- b) Create instructions
- c) Test the recovery plan
- d) Create a plan

All of the answers are necessary in recovery planning. The first step is to identify critical systems.

8. What is the last step in recovery planning?

- a) Identify critical systems
- b) Create instructions
- c) Test the recovery plan
- d) Create a plan

All of the answers are necessary in recovery planning. The last step is to test the recovery plan.

9. How long did Sharon work for her company?

- a) 26 years
- b) 25 years
- c) 24 years
- d) Unknown

Sharon was nearing retirement. She had worked for her company for a total of 26 years.

10. When was Sharon retiring?

- a) A Year
- b) 2 weeks
- c) A month
- d) 2 months

Sharon was going to retire in a month. She was surprised that there was no candidate for her replacement.

Activities

During the facilitation of a lesson Worksheet or Handout may be utilized to help present the material. If a lesson calls for a Worksheet or Handout it will be listed in the Lesson Plan box under Materials Required. The trainer can then utilize the Activities folder for the corresponding material and then provide it to the participants. They are all on separate Word documents, and are easily edited and customized.

Below you will see the Worksheets or Handouts that are utilized during the training of the above lesson. They are located in the Activities folder and can be easily printed and edited for the participants.

Sample Worksheet: Business Continuity

Identify the threats that would disrupt your business continuity.

This image shows a single page of white paper with horizontal blue or grey ruling lines. The lines are evenly spaced and run across the width of the page, leaving small margins at the top and bottom. There are no vertical margin lines, text, or other markings on the page.

Quick Reference Sheet

Below is an example of our Quick reference Sheets. They are used to provide the participants with a quick way to reference the material after the course has been completed. They can be customized by the trainer to provide the material deemed the most important. They are a way the participants can look back and reference the material at a later date.

They are also very useful as a take-away from the workshop when branded. When a participant leaves with a Quick Reference Sheet it provides a great way to promote future business.

Administrative Office Procedures

Use a Template to Stay Consistent from Track to Track

Consistency can be difficult to attain when you are moving from track to track. Implementing the use of a template will develop consistency between tracked procedures. There are different templates available, but you can also create your own template and tailor it to the needs of your organization.

What to Include in a template:

- Department: The department that the procedure falls under
- Category: The division that the procedure falls under (Accounting, HR, etc.)
- Job: The job title of the individual who typically performs the procedure
- Purpose: The reason for the procedure's implementation
- Statement: The policy statement outlines the actions and behavior required using the active voice.
- Regulations: List any laws or regulations to which the policy applies
- Related information: List any guidelines, policies, or procedures related to the new policy.

You may also need to include keywords, definitions, or background information, depending on the scope and complexity of your procedures.

Allow Office Personnel to Express Improvements/Updates if Needed

Never underestimate the importance of feedback. The people who use the guide are the best ones to listen to when it comes to making improvements and updating the information. Do not simply wait for people to share their views. Provide employees with different opportunities to communicate with you.

For example:

- Discuss the binder at weekly meetings.
- Provide surveys.
- Bring it up in one-on-ones.

Depending on the organization of the company, you may choose to allow employees to update the binder on their own.

Effective Time Management

Every organization can benefit from effective time management. When documenting procedures, it is important to include time management strategies.

Strategies:

- Stay organized: Organize the workspace so that you do not waste time looking for things.
- Prioritize tasks: Complete important tasks before the unimportant ones.
- Stop procrastinating: Identify procrastination and avoid it.
- Make a schedule
- Delegate: Give others the responsibilities that do not require your attention.

Binders should include tools with the strategies to help manage time. Tools that binders may include are schedules, time sheets, checklists, and estimated timing per task to help employees keep track of their work and make adjustments as necessary.

Certificate of Completion

Every course comes with a Certificate of Completion where the participants can be recognized for completing the course. It provides a record of their attendance and to be recognized for their participation in the workshop.

CERTIFICATE OF COMPLETION

[Name]

Has mastered the course

Administrative Office Procedures

Awarded this _____ day of _____, 20____

Presenter Name and Title

PowerPoint Sample

Below you will find the PowerPoint sample. The slides are based on and created from the Training Manual. PowerPoint slides are a great tool to use during the facilitation of the material; they help to focus on the important points of information presented during the training.

Module Two: Why Your Office Needs Administrative Procedures

Administrative procedures are more than mundane policies. They are put in place to ensure the survival of the company in any event or situation.

You can't do today's job with yesterday's methods and be in business tomorrow.

Anonymous



Business Continuity

Determine risks that the company will likely face

Analyze effects of each risk or hazard on different aspects of company

Develop a team and strategy to address the potential problems

Succession Planning

Identify
goals and
objectives

Recognize
trends in
the
workforce

Identify
needs in
the
company

Internal and External Audit Requirements

Adequate testing

Verification and review

Provide report

Module Two: Review Questions

1. Business continuity is also called _____.
 - a) Business strength
 - b) Business continuance
 - c) Business conformity
 - d) Business combination

2. What is not an example of a risk?
 - a) Weather
 - b) IT
 - c) Sabotage
 - d) Functions

Module Two: Review Questions

1. Business continuity is also called _____.
 - a) Business strength
 - b) Business continuance
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Business continuity is also called business continuance. It keeps a company going in the event of a disaster.

2. What is not an example of a risk?
 - a) Weather
 - b) IT
 - c) Sabotage
 - d) Functions

Functions need to be analyzed in business continuity, but they are not risks. The other answers are.

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